

A photograph of a large, multi-story brick building, likely a university library or administrative building, with many windows and a central tower-like structure. The building is surrounded by green trees and a lawn. The text is overlaid on the image.

Funding OERs in ND: From \$0 to \$6M in Savings in 3 years

**Stephanie Walker, Dean of Libraries & Information
Resources, University of North Dakota**

ALADN 2018

2015: Where Were We?



2015: Where Were We?

- Generally old-fashioned library, minimal modern aspects.
- Comments:
 - **“It looks exactly like it did when I graduated in 1979!”** (Parent of prospective student)
 - **“It’s a 1970s library with a thin crust of computers.”** (Parent of staff member)
 - **“This is a library????”** (Students, in an ethnographic survey)
- What we looked like is what we were, **in OERs** & elsewhere. Library NOT involved in OERs. Interested, but blocked from action. Just 2 faculty used OERs - 1 on own, 1 w/CALI.



2015: Where Were We?

- **UND Today** - “In 2015, when UND Provost Tom DiLorenzo welcomed Stephanie Walker as the new Dean of Libraries, the conversation about OERs was faint. Even if you listened closely - crickets.”
- **May 2015** – Respected senior faculty member, member of SBHE, Dr. Tom Petros excoriates OERs as threat to academic freedom at University Senate. BIG job ahead of us ... but early signs of hope



2018: In Just 3 Years ... Where Are We So Far?

- **Obtained Funding from:**

1. State gov't (Twice)
2. NDUS (Twice)
3. Northern Plains Heritage Foundation
4. Donors - Robinson family (& Others Interested)
5. UND Student Gov't
6. Office of Provost
7. Office of Extended Learning
8. Dean of Arts & Sciences
9. Digital Press @ UND
10. And More!

2018: In Just 3 Years ... Where Are We So Far?

- **Saved UND students alone over \$6M in 3 years, on an investment of about \$200K!**
- ND cited as model in recent \$5M Congressional OERs funding!
(<https://sparcopen.org/news/2018/open-textbooks-fy18/>)
- OERs used in 43+ courses, every college & school, can do 1st year w/o buying textbook.
- Get inquiries from faculty ***weekly!***
- Working w/ND auditor to facilitate access to OERs & collaboration; speaking w/ ODIN (Online Dakota Information Network -59 library consortium) re/statewide searchable site.
- ***Completely*** changed culture.
- **10 key factors to our success.**

Back to 2015 - Beginnings of Funding

- **Statewide:**
 - **Spring 2015** – *Dr. Tanya Spilovoy*, then-NDUS Director of Distance Learning, makes presentation to ND Legislature re/spiraling textbook costs. Rep. Tom Beadle writes bill giving **\$100K** to NDUS to promote & adopt OERs across ND. **The first funding!**
 - **October 2015** – *Spilovoy* organizes 2-day OER Summit @ VCSU. Walker attends, with 8-10 faculty & staff. **Guest speaker:** Dr. Dave Ernst & others from U Minnesota's enormous Open Textbook Initiative. Faculty who attend are interested & impressed.
- **UND:**
 - **September 2015** - Walker starts as UND's 1st Dean of Libraries & Information Resources. Mandate for **comprehensive** changes, incl. OERs.
 - **October 2015** – Provost introduces Walker to Dr. Thomasine Heitkamp, gives free reign to develop & co-chair new OERs Working Group.



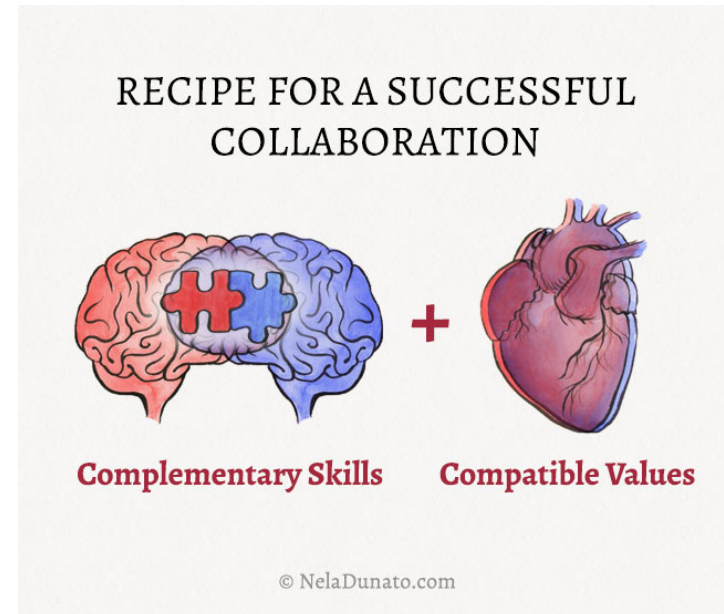
Early Steps

- Walker & Heitkamp discuss OER WG composition. This becomes KEY factor in success.
- **KEY FACTOR #1: INCLUSIVENESS** - Toss a *very* broad net!



Early Steps

- **KEY FACTOR #2: LEADERSHIP CLARITY & COMPATIBILITY** - Co-chairs have **complementary skills, shared vision, compatible values, trust**
- Walker: Deep familiarity with OERs; no history w/UND.
- Heitkamp: New to OERs; lifelong ND'n, 30+ years @ UND, deep community ties (sister of Sen. Heidi Heitkamp & radio host Joel Heitkamp).
- Both committed to helping students succeed, concerned w/rising costs.
- Heitkamp backed Walker's assertions re/value of OERs, convinced faculty to listen, gently "strong-armed" faculty into participating; they trusted her.





Early Steps

- **November 2015** - 1st UND OER WG mtg! Members - administration (Walker, Heitkamp), faculty, staff (librarians, instructional designers, IT), students (VP & Pres. Student Gov't), other partners (*Spilovoy*, NDUS, funders). ***Membership is flexible.***
- No “turf battles” – *Dr. Spilovoy* happily worked with UND, UND staff happily worked with NDUS. *Dr. Spilovoy* announces **\$100K fund**, invites OER proposals across NDUS.
- **KEY FACTOR #3: STUDENT & FACULTY INVOLVEMENT** – Involve students & faculty directly, heavily. OERs can't just be project of Library or IT.
- **KEY FACTOR #4: FLEXIBILITY** – Over time, membership & funding & projects adapted. No limit on membership, subcttees as needed. Partnered w/other groups on events.



Beginnings of Success!

- **December 2015** – Heitkamp & Walker write 2 successful grants to NDUS.
 - **Grant #1:** “Opening the *History of North Dakota*” – PI Walker - **partners** incl. Northern Plains Heritage Foundation (\$15K), Digital Press @ UND (\$5K), Robinson family



- **Grant #2:** “Faculty Participation in Use of OERs @ UND” – PI Heitkamp coaxes faculty from Psych, Soc, Poli Sci, & Aviation to participate. Later, Math asks to join; Heitkamp seeks \$ from College of Arts & Sciences (\$6K), Extended Learning (\$6K).
- **Walker speaks to University Senate w Heitkamp’s Support** – Reports on successful grants, \$ from ND Legislature, UND, foundation, university press, donor. ***NO desire to override academic freedom.*** Choosing texts is faculty prerogative; ask them only to consider OERs alongside other resources. Well received.

Beginnings of Success

- **KEY FACTOR #5: DIVERSIFIED FUNDING** – Can't run OER program with no \$ or just library \$. Even just internal \$ not as effective & attention-getting as \$ from multiple *internal & external* sources. *Dr. Spilovoy's* success in obtaining state funding was key in getting programs off the ground!
- **KEY FACTOR #6: BROAD SUPPORT** – Early moral as well as financial support from -
 - Provost
 - ND State Legislature
 - Statewide Consortium (NDUS)
 - Foundation (Northern Plains HF)
 - University Presses (DP@UND, NDSU Press, U Nebraska Press)
 - Campus partners (College of Arts & Sciences, Office of Extended Learning; partnerships with Office of Instructional Design, Center for Instructional & Learning Technologies, Essential Studies, Extended Learning, etc.)
 - Private Donor (Robinson).



Progress Continues

- **January - June 2016** – UND OER WG continues to meet. Develops **2-pronged strategy**:
 - **Education** – Events, Workshops, Seminars, Training
 - **OERs** – Funding OERs, Working with Faculty, Supporting Adaptation of Courses.
- **KEY FACTOR #7: FOCUS.** **Limit Yourself!** Didn't support writing *new* Open Textbooks – too much work for the \$3k/faculty we decided we could afford. Focus on 1-2 efforts.



Progress Continues

- **January 2016 – Event #1** - Dave Ernst of U Minnesota @ UND. Well attended.
- **May/June 2016** – Worked w/faculty grant recipients, OER WG. WG Members from CILT & Library created program, giving faculty hands-on time to work on OERs, offering info on Tech Support (e.g. video captions, etc.), Creative Commons Licensing, Copyright & IP, Finding Reliable OERs, OER LibGuides & Other Resources. Trainers incl. Instructional Designers, Librarians, Legal Counsel.



OPEN TEXTBOOKS

Access, Affordability, and Academic Success

David Ernst, PhD

University of Minnesota



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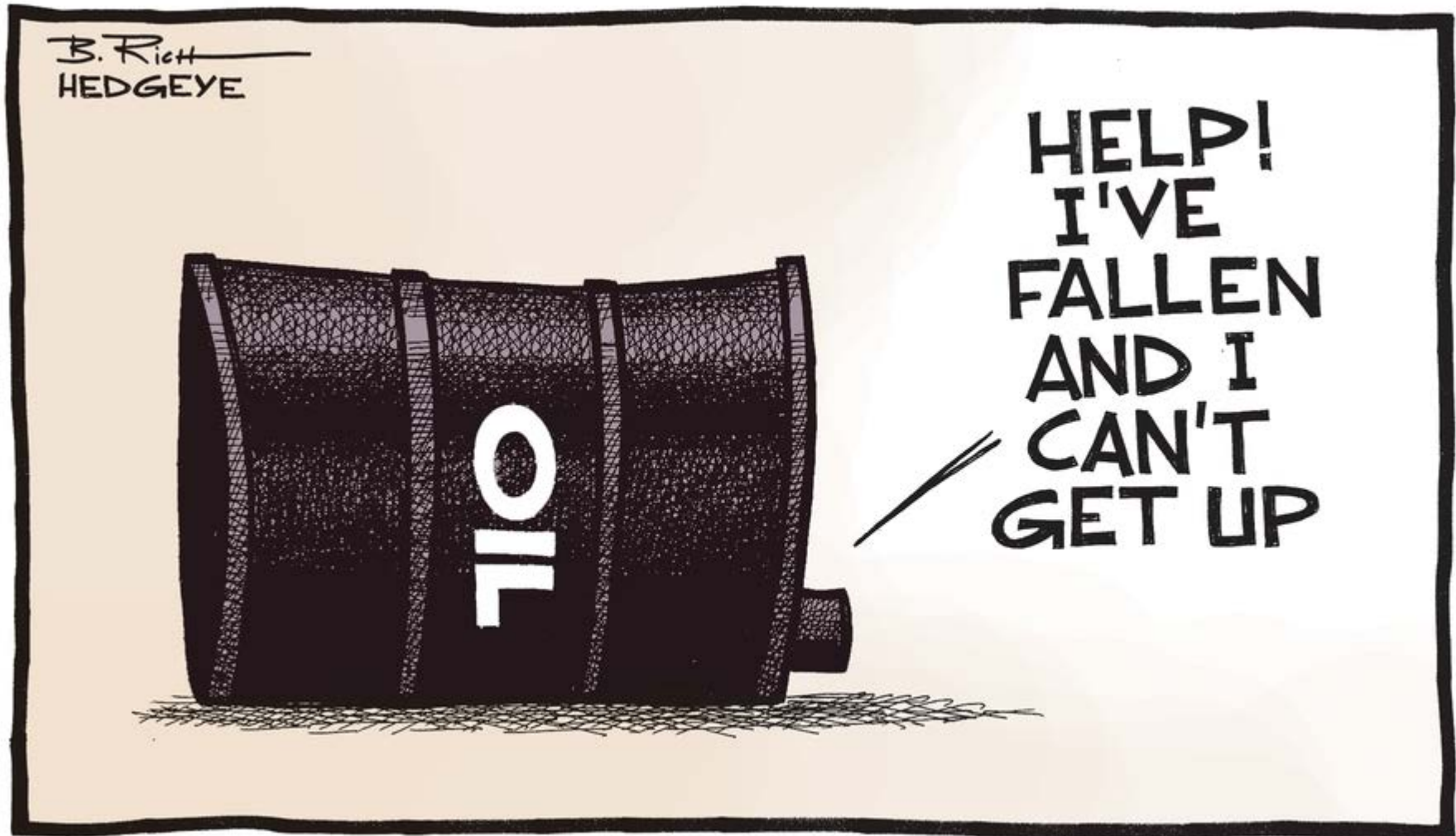


LAUNCHED!

- **Fall 2016 - Launched!** First UND OERs under NDUS/ND Legislature funding are used in class.
- **Late 2016 – Tallied successes:**
 - **Financial:** Saved students **nearly \$1 million** in first round!
 - **Student Success:**
 - **Research:** Prof. Clinton assessed retention, how students liked text, grades, other factors while using traditional text (\$154.50), then OER. Copy in ResearchGate, soon to be added to UND Scholarly Commons – V. Clinton, “Savings Without Sacrifice” ([https://www.researchgate.net/publication/324088320 Savings without sacrifice A case report on open-source textbook adoption](https://www.researchgate.net/publication/324088320_Savings_without_sacrifice_A_case_report_on_open-source_textbook_adoption))
 - **Results:** Students liked both texts. Grade distributions same. Of 800+ students, 24 ***fewer*** dropped course. Ongoing assessment. OERs help retention, possibly timely completion? Perhaps fewer drop-outs? Math is also assessing. Need more research.
- **Late 2016 –** UND gets new President, Hon. Mark Kennedy.

Complications ... Perhaps

- **2016** – ND budgets crash. It became *urgent* to demonstrate, appreciably, one's concern re/rising costs of higher ed. UND got good PR on OERs, amid budget cuts ...



Events & Publicity

2016-2017 – Publicity

- **Legislature** – Video, Testimony by Pres. Kennedy
- **Local News** – Multiple articles on OERs in *Grand Forks Herald*.
- **UND Today** – Many stories on OER actions, events, savings. (Newsletter)
- **Local Events, Conferences** – Librarians, faculty, & staff speak on aspects of OERs

The screenshot shows a web browser window displaying the Grand Forks Herald website. The browser's address bar shows the URL: www.grandforksherald.com/news/education/4047332-free-online-textbook-use-grows-state-universities. The website header includes the "Grand Forks Herald" logo, a search bar, and navigation links for "NEWS", "ENTERTAINMENT", "LIFE STYLE", "SPORTS", "OBITUARIES", "OUTDOORS", "OPINION", and "MILESTONES". A weather widget shows "A Few Clouds WEATHER 7°". Below the header, there is a "LIVE" section with a play button icon and the text "WDAY/WDAZ News at 4". The main article is titled "Free online textbook use grows at state universities" by Anna Burleson, dated Jun 3, 2016 at 4:30 p.m. The article features a photo of a young man and woman looking at a laptop. To the right of the article, there is a "PRINT" button and a sidebar with a "Pifer's LAND AUCTIONS" advertisement and a "LATEST" section with a headline: "Grand Forks man given 12 years in prison for sexually assaulting child".

Events & Publicity

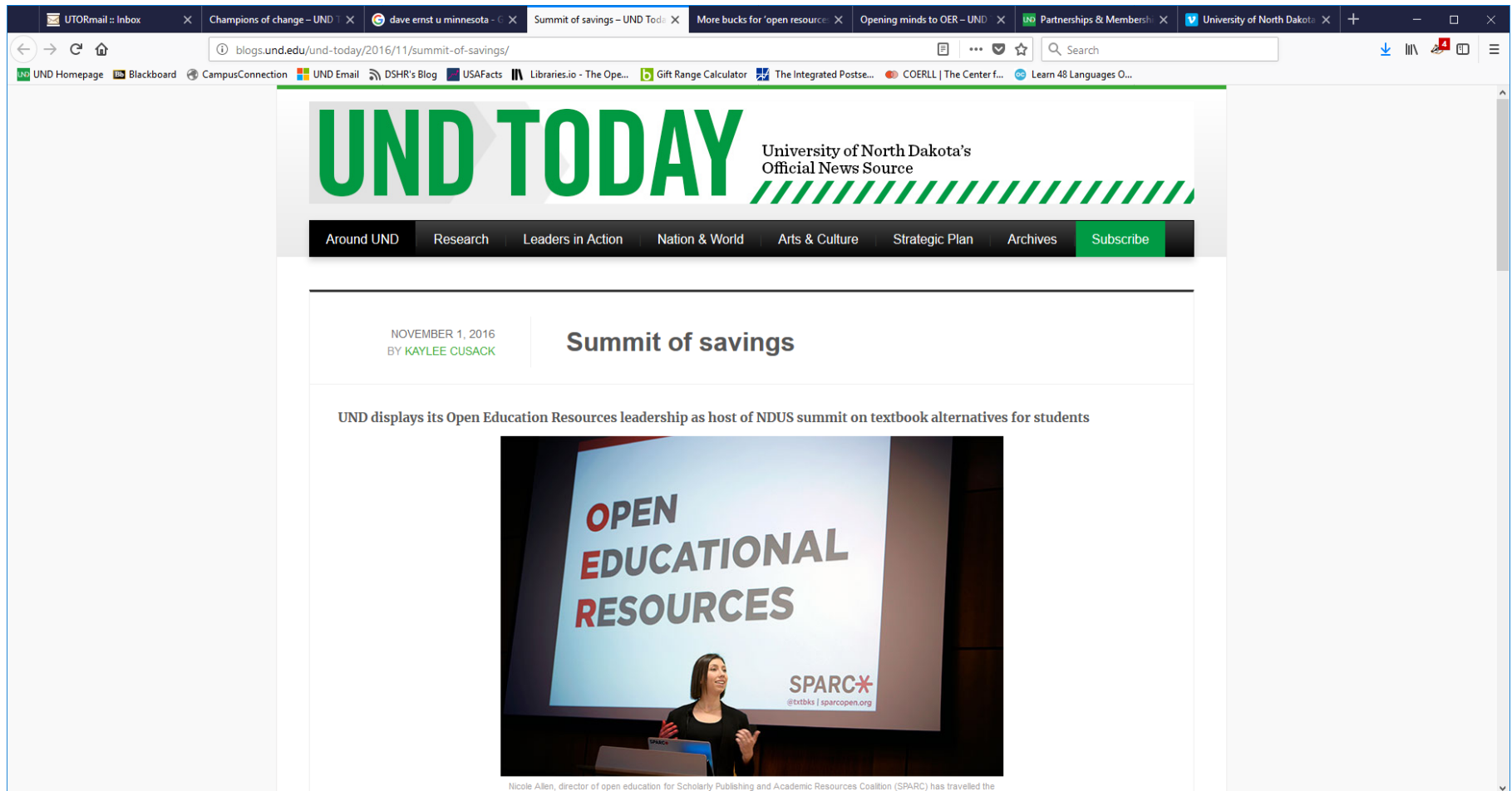
2016-2017 – Some Events -

- **March 2016 – Faculty & Student OER Symposium** – Faculty participants from Round 1 gave presentations. Student gov't president spoke of positive effect on students. 65+ attendees.

KEY FACTOR #8: KNOW THE AUDIENCE – Faculty want to hear from faculty, & will believe them. Faculty also want to hear from students. Students want to hear from other students, & will believe them. Library didn't cheerlead – offered help, but let people judge for themselves.

Events & Publicity

- **October 2016 – Statewide OER Summit** – Keynote Speaker Nicole Allen of SPARC. *Dr. Spilovoy* assisted with creation, attended. Speakers from UND, VCSU, etc. Faculty, students, legal, library. Cast wide net for attendees. Invited faculty, staff, librarians, schoolteachers, legislators, Rep. Beadle, press. **108 attendees! HUGE for ND.**





Moving Forward

2016-2017 – Progress/Funding

- **December 2016 – Round 2, NDUS/ND Legislature funding** – About \$50K remained. Many faculty interested, but too busy. Walker jumped into breach, drafting 5 of 7 proposals for faculty. 5 proposals funded, *far more* than any other NDUS institution.

KEY FACTOR #9: WILLINGNESS TO JUMP INTO THE BREACH



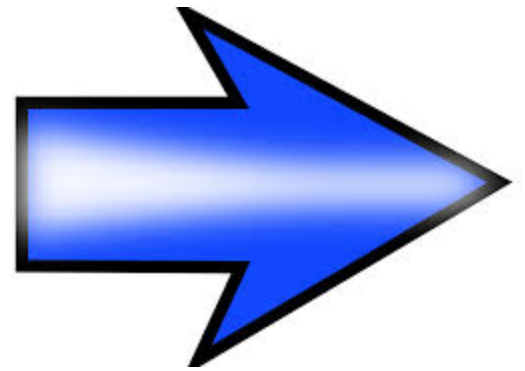
Mature System Evolves

2017 – 2018: Mature System Evolves!

- **April 2017 – Student Gov't \$** – ND Legislature didn't fund this round, funded K-12 OERs instead. Student Gov't President wrote bill to give us **\$75K of Reserves!** Walker spoke to Student Senate. Passed unanimously! Student Gov't President convinced Provost to contribute **\$25K - \$100K for OERs**, UND-only! **(Student Gov't Pres & VP were on OER WG)**
 - **April 2017 – December 2017 – Progress** - More training & grants. For Round 3, OER WG developed submission guidelines, forms. Huge response – 14 courses – funded 13.
- KEY FACTOR #10: BROAD ADOPTION** - OERs in EVERY College. In 2016, UND Pres. Kelly retired, Interim Pres. (former Gov.) Ed Schafer began. Provost DiLorenzo taught Psyc101 using OER. Pres. Schafer taught Intro to Gov't using OER. **Administration put its \$ (and its work!) where its mouth was!**

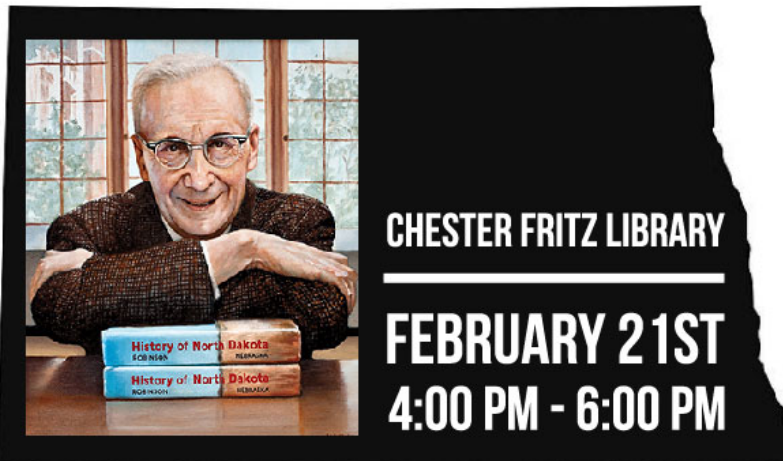
Mature System Evolves

- Learned what to do/not to do, what was/wasn't popular. Developed FAQs.
- **More Events:**
 - **October 2017** – Guest Speaker, Gerry Hanley (MERLOT/Cal State)
 - **February 2018** – Gala opening - “**Elwyn B. Robinson & the *History of North Dakota: A Multimedia Experience.***” 60+ attendees. Showcased *History of North Dakota* OER, new UND Scholarly Commons, & new “Magic Box” (digital interactive display tool).



Invitation to Tripartite “Grand Opening” – OERs, Magic Box, & UND Scholarly Commons

ELWYN B. ROBINSON'S HISTORY OF NORTH DAKOTA A MULTIMEDIA EXHIBIT



The Chester Fritz Library welcomes you to its first multimedia interactive exhibit celebrating Elwyn B. Robinson's *History of North Dakota*. This book, a standard text throughout ND high schools and colleges, is now a **freely available open access e-book** hosted in UND's [Scholarly Commons](#) Digital Repository. The multimedia exhibit resides in a [Magic Box](#) display case and pulls together photos, artifacts from Special Collections, videos from UND faculty, plus allows the viewer to turn the pages of the digital book. Funding for the Magic Box generously provided by the Colonel Eugene E. Myers Foundation. Join us Wednesday, February 21st from 4:00 p.m. to 6:00 p.m. at the Chester Fritz Library. *Refreshments will be served. Please RSVP to Carol Herman at carol.herman@library.und.edu*

Finally – Solid, Mature System – OERs for Student Success!

- **Spring 2018** – Sent call for Round 4 of funding. Student gov't went to ND Legislature for \$, promoted successes. Legislature granted another **\$100K to NDUS**, among 11 institutions – though 9 have done few/no OERs. Leftover funds may be redistributed.
- Got 12 more applications, incl. repeat customers from History, Sociology, Communications, Engineering. Also Aviation, Geography, Social Work, Psychology, Geol. Engineering, etc. Over 43 courses now using OERs, many with multiple sections. Get about 2 queries/wk!
- **THE BIG KAHUNA** – **\$5M in Congressional funding** will be available to support OERs, thanks to SPARC & WICHE – **Nicole Allen & Tanya Spilovoy - & to our students!** Letter signed by 50+ student gov'ts, incl. UND's. <https://sparcopen.org/news/2018/open-textbooks-fy18/>. They were impressed by systems in GA & ND. For ND – that's almost all us!



2018: Where Are We Now?

- **Program** – Mature OER program, stable \$.
- **Savings** – Total savings **\$6M+ in 4 rounds of funding, on just \$164K investment**. Huge ROI.
- **Funding** – **Internal & external funds, from many sources.**
- **Standing/Reputation/Publicity** –
 - UND known as OER leader in region & even beyond. Mentioned as a national model in **\$5M** Congressional funding. Nicole Allen testified to Congress.
 - External PR growing. Pittsburgh newspaper, mentioned in report for Colorado.
- **Culture Shift** –
 - Participation remains broad. ***Critical*** to have Student Gov't there.
 - Complete change in attitude. (Even Dr. Petros is a fan, speaks at events.)
 - Some faculty still nervous about OERs, but not re/academic freedom, nor do they think “open” means “junk”. Realization re/quality variances, as traditional publishing has. Concerns are “How will this count toward tenure?”
 - Better understanding of benefits & limits.
 - OERs mentioned in official faculty handbook, as valid endeavors.
 - USLC working on OA Statement of Support.

Thank You!

